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| <b>Purpose</b>                 | Outline required and optional components of applicant and charts   |
| <b>State Requirement</b>       | Local agencies will maintain a chart for each client in the WIC Program. The chart can be set up for individuals or families.  |
| <b>Required Chart Contents</b> | <p>Each individual/family chart will contain the following required components in English or Spanish:</p> <ul style="list-style-type: none"><li>• Signature Form</li><li>• Health Assessment</li><li>• Diet Recall</li><li>• Growth charts for infants, children, or pregnant women</li><li>• Individual Plan of Care</li><li>• Alternate shopper authorization forms, including any voided forms.</li><li>• Copy of all special use documents completed and/or received.</li><li>• Release of Information Form</li><li>• Statement of status form</li><li>• WIC Incident Form</li><li>• Physician's prescription</li><li>• Return receipt card for mailed checks</li><li>• Any written notes used in lieu of a proxy form</li><li>• Other documentation applicable to specific situations</li></ul> |
| <b>Optional Items</b>          | A flow chart developed by the local agency may be included in an individual/family chart.  |

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**Chart Organization**

Agencies may use a family file or individual file system.

The flow chart (if used) should be in front of the chart.  
Group information together by certification period.

Order each certification period from most recent to oldest.

Keep proxy and alternate shopper forms in a visible location.

Maintain a consistent method of organizing charts and files within a team or agency.